DOCUMENT RESUME

ED 216 149 CE 032 196

AUTHOR Schmidt, Warren H.; Beckhard, Richard
TITLE The Fact-Finding Conference: What It Is, When to Use It, How to Plan and Conduct It. Adult Education Monographs: 1.
INSTITUTION Adult Education Association of U.S.A., Washington, D.C.
PUB DATE 56
NOTE 32p.

EDRS PRICE MF01/PC02 Plus Postage.
DESCRIPTORS *Adult Education; *Conferences; Consultants; Data Collection; Definitions; Guidelines; Information Dissemination; National Programs; *Planning; *Program Content; *Program Development; *Program Implementation
IDENTIFIERS *Factfinding

ABSTRACT

This manual describes the fact-finding conference and provides guidelines for determining when to use one, for planning one, and for conducting one. Defined first are various types of conferences, including the information-giving conference, the problem-solving or decision-making conference, the information-exchange conference, and the fact-finding conference. The role of fact-finding conferences in a national adult education project is examined. Following a discussion of various features of the fact-finding conference, guidelines are set forth for implementing the various phases of it, including initial planning; program development; final preparation; conducting the conference; and reporting, appraisal, and followup. A sample agenda and sample report-form questions are provided. Also analyzed is the role of the conference consultant. (MN)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED216149

ADULT EDUCATION MONOGRAPHS

THE FACT-FINDING CONFERENCE

by Warren H. Schmidt
and Richard Beckhard

Adult Education Association of the U. S. A.

- What It Is
- When To Use It
- How To Plan and Conduct It

U.S. DEPARTMENT OF EDUCATION
NATIONAL INSTITUTE OF EDUCATION
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

✓ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official NIE position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

B. Capeland

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)." 2

Note: This is the first of a series of Adult Education Monographs that will be published by the Adult Education Association as suitable material becomes available and circumstances permit. The monographs will be either previously unpublished material or material reprinted from the AEA's professional journal, *Adult Education*. This first monograph on the fact-finding conference has not previously been published.

Single copy.....$1.00

5-24 copies.....65¢ each

25 or more copies.....50¢ each

Copyright © 1956
by the Adult Education Association
of the United States of America.

THE FACT-FINDING CONFERENCE

- What It Is
- When To Use It
- How To Plan and Conduct It

By Warren H. Schmidt

Head, Department of Conferences and Special Activities
University of California (Los Angeles)

and Richard Beckhard

Executive Director, Conference Counselors
New York City

Adult Education Association of the United States of America
743 N. Wabash Ave.
Chicago 11, Ill.

The authors and publisher of this Monograph are indebted to the work of the Area Organization and Conferences Project of the Adult Education Association of the U.S.A. for much of the information and experience on which it is based. This project was an exploratory program established by the AEA in 1952 for three years to test how national field service might contribute to developing local and regional organizations.

The members of the Area Organization and Conferences Project Committee were: James E. Arnold, University of Tennessee; Richard Beckhard, Conference Counselors, New York City; Leslie E. Brown, Cleveland College, Western Reserve University; William Cooper, Hampton Institute; Thelma Dreis, Bureau of Human Nutrition and Home Economics, U.S. Dept. of Agriculture; Alice Halligan, Springfield Adult Education Council, Springfield, Mass.; Herbert Hamlin, University of Illinois; Andrew Hendrickson, Ohio State University; Norris A. Hiett, Extension Division, University of Texas; Everett M. Hosman, Omaha, Nebraska; Evelyn Lewis, Adult Education Council of Denver; Fern Long, Adult Education Division, Cleveland Public Library; Miss Mary Lyle, Iowa State College; George C. Mann, Bureau of Adult Education, California; Everett C. Preston, Division of Adult Education, New Jersey; Robert E. Sharer, Continuing Education Service, Michigan State College; Bessie Sharp, New York Adult Education Council, New York City; Thomas West, Adult Education Council of Greater Chicago; Alfred C. Nelson, Community College, University of Denver; Nicholas P. Mitchell, *Florida Keys Keynoter*, Marathon, Florida; Warren H. Schmidt, Staff Coordinator.

The Area Organization and Conferences Project was succeeded in 1955 by the Field Development Committee of the Adult Education Association of the U.S.A. The present members of the AEA Field Development Committee, who have contributed advice and helpful suggestions in the preparation of this Monograph, are: Per Stensland, Adult Education Program, Education Dept., Texas Technological College; Leslie E. Brown, Cleveland College, Western Reserve University; Stephen Deane, Dept. of Philosophy, Psychology, and Education, Simmons College; Maurice F. X. Donohue, University College, University of Chicago; Herbert M. Hamlin, University of Illinois; H. Curtis Mial, New York State Citizens' Council, Inc.; Lucy Morgan, Dept. of Health Education, University of North Carolina; Harry J. Skornia, National Association of Educational Broadcasters; Stanley Sworder, Bureau of Adult Education, Sacramento, Calif.; Bonard Wilson, Staff Coordinator.

TABLE OF CONTENTS

I. An Analysis of Different Types of Conferences..... 4

II. The Role of Fact-Finding Conferences in a National Adult Education Project 8

III. Ten Features of the Fact-Finding Conference..... 12

IV. Planning and Conducting the Fact-Finding Conference..... 16

V. A Word about the Conference Consultant 24

VI. To Sum Up..... 27

I

AN ANALYSIS OF DIFFERENT TYPES OF CONFERENCES

The conference, as a medium of communication, as setting for problem-solving, decision-making, planning, and idea-sharing, is a major activity for all of us who work in organizations or in communities. Most of us want to improve our efficiency in using the conference medium, since it represents such a large investment of time.

In recent years, social scientists have studied the problems of communication and adult educators have refined the methods and techniques of communication. This research and experimentation has pointed up the fact that conferences are complex, requiring careful and systematic planning if they are to produce results.

It has also become apparent that there are different types of conferences, and that each type has different kinds of results.

You are probably familiar with three types of conferences: information-giving, problem-solving, and information exchange. This Monograph introduces a fourth kind: The *fact-finding* or *exploratory conference.* Let's look at the differences between the first three types and the fact-finding conference.

the information-giving conference

As the name implies, the unique characteristic of this form is that the planners present information to the conference participants. Action or problem-solving stimulated by such a conference occurs after the conference is over and is likely to differ for different participants. It is likely that there will be no group consensus called for on anything. If a community defense director called together representatives of various agencies to tell them about the state-wide civil defense plan, he would be unrealistic to hope for any group action at the conference. Any action would

have to be taken subsequently, either individually or at another and different kind of conference.

the problem-solving or decision-making conference

This type of conference is designed to get group agreement or action on some problem, issue, or policy. The convener definitely expects to get decisions made or problems solved at the meeting. If, for example, the participants in the civil defense meeting mentioned above had gone back to their agencies and called conferences to decide how they might participate in a community program, these meetings would be decision-making conferences. The outcome hoped for would be a plan of action which the agency could carry out.

the information-exchange conference

Here, participants need information *from each other* rather than from the convener or an outside source. The convener's objective in this case is to provide a setting where such exchange of experience can take place. It is assumed that the participants have previously decided that it will be useful to spend time in this manner. The participants in an information-exchange conference are seen as resource people. The convener usually serves as a resource person as well as a discussion leader. To follow our illustration, a group of agencies might hold an information-exchange conference to compare notes on what each of them was doing to further the civil defense program. The information-exchange conference does not require group agreement or action although they sometimes occur as by-products.

the fact-finding conference

The distinguishing characteristic of this type of conference is that its *primary* objective is to get from the participants information and opinions which will form the basis of future planning and action. In this type of meeting, the participants again are chosen because of their resources. Although action is often a by-product of the fact-finding conference, the objectives of the meeting are attained even if the group does not arrive at agreement or commitment to action.

If our civil defense official had convened representatives of the various agencies in his community to find out what their attitudes were toward the civil defense program, and what steps they thought were needed—all this as a basis for a governmental decision as to how much staff and budget would be allocated to this community—this would be a fact-

finding conference. The convener would be collecting information from the participants.

Here are some of the situations in which the fact-finding conference can produce significant results:

Within an Organization.

1. Periodic conferences by national staff with regional or state leaders.
2. Assessment by state staff or leaders of needs and problems at community level.
3. Periodic reporting by field staff to headquarters staff.
4. Visits by national staff to local communities.
5. Determining needs, problems, and attitudes of staff several levels lower.

One president of an industrial concern, for example, holds a fact-finding conference with each group of first-line supervisors once a year. He gets a great deal of information, but does not disturb the relationship between these men and their immediate supervisors, since the conference is for information and not action. These conferences have had a significant effect on morale.

Among Organizations

1. Exploratory meetings to determine needs for cooperative or coordinated activity in a particular field, at the local, state, regional, or national level.
2. Meetings of groups of interested leaders to explore facts on a particular community problem.
3. Fact-finding about professional standards in a particular field.
4. Identification of gaps in services by representatives of agencies.

These are a few instances in which fact-finding conferences can serve an important function. Specific illustrations of other situations will be discussed as we go along.

One hazard in convening a fact-finding conference is that the planning group sometimes has purposes in mind other than the stated ones. The fact-finding conference is misused if it is convened for the primary purpose of "easing" a reluctant group into some kind of action. An analogy might be the type of magazine salesman who begins his sales

pitch by pretending to conduct a survey on reading habits. The planner probably ought *not* to convene a fact-finding conference unless he believes:

1. that there are problems in which the participants have common interests and about which they have experience;
2. that if these common interests and the information about the problem are made known, the group will be capable of deciding whether or not any action is appropriate;
3. that the planner's responsibility is essentially to create a situation in which the relevant information and experience can come into the open. He assumes no responsibility for subsequent action of the group.

When a planning group feels that some kind of action is desirable, it is well to indicate this impression in the letters of invitation. This calls for a different type of conference, however. In this case the planner says, in effect, "Some of us feel that there is a need for this committee to begin some concerted action along these lines. We are asking those people who have ideas and opinions about this problem to come together and examine the feasibility of joint efforts to deal with it." Such a conference moves closer to becoming a problem-solving, rather than a fact-finding conference. There is an implication that the group is to make decisions. This poses certain problems, particularly when the participants are selected because they represent different organizations or segments of the community. Participants will tend to be more cautious in expressing ideas when they feel that they are making or implying commitments for the groups they represent.

II

THE ROLE OF FACT - FINDING CONFERENCES IN A NATIONAL ADULT EDUCATION PROJECT

To better understand why the fact-finding conference deserves careful attention, let's look at how one national organization used this medium—and some of the results.

As the reader follows this brief case study, he ought to keep in mind these things:

1. Like most national organizations, the Adult Education Association of the U.S.A. continually faces the question of how to stimulate local constituent groups without taking the initiative away from them.
2. Adult educators, like other people, sometimes tend to view "stimulation" by national headquarters staff with some initial suspicion. They resist efforts to be "organized" or "mobilized" or "trained" by outsiders. This is not unlike the kind of resistance many a training officer encounters when he tries to set up a training program for staff specialists who perceive themselves as both competent and busy.

The AEA Area Project began its three years of operation in March, 1952. Under a grant of $90,000 from the Fund for Adult Education, a systematic study and action program was begun to help the AEA achieve its objective of strengthening local organizations for adult education. The

Project was planned by a committee of 25 carefully chosen adult educators, selected to represent various geographic sections of the country.

Like many newly-appointed groups, the Area Project Committee discovered that they lacked sufficient information to make wise decisions about how to spend the funds entrusted to them. Even after two questionnaire surveys of representative leaders of adult education associations, Committee members felt that their information was inadequate for long-range planning.

It was at this point that the Committee decided on a different type of national survey. They agreed to bring representative adult educators together for a day to sit down with one or two members of the Area Project Committee to do a systematic job of identifying the problems that they and their colleagues were facing. By doing this the committee hoped to get a better sense of the adult education movement in the United States today.

Twelve such fact-finding conferences were scheduled—in Boston, Philadelphia, Atlanta, Cincinnati, Chicago, Omaha, Austin, Denver, Seattle, Los Angeles, Phoenix, and Reno. Each of these conferences brought together from 15 to 100 representative adult educators and community leaders, usually from neighboring states, along with one or more members of the Area Project Committee and staff.

Before the conferences actually got underway, Committee members and staff asked themselves questions like these:

"Whom should we invite to these conferences?"

"What can the participants get out of these meetings?"

what happened at the conferences

No member of the Project Committee or staff would have ventured to predict in 1952 that the simple fact-finding process would set off a chain reaction of activities in states and regions throughout the country. It was only as reports began to come in that the full potential of the fact-finding conference became clear. Again and again these meetings, which had been set up to collect information, proved to be stimulants to cooperative action. Here are some specific illustrations:

In one town leaders of several community agencies felt that the public school officials were trying to control the adult education activities in the community. Because of this feeling there was little cooperation between the public schools and these other groups.

This problem came up at a fact-finding conference. The discussion revealed that PTA officers had discussed this problem among themselves; the YMCA personnel among themselves, etc., without ever bring-

ing their feelings to the attention of the public school officials. In the meantime, the school people felt the leaders of the voluntary groups were not interested in adult education. When the facts were revealed at the conference, both sides discovered that this was a problem which they could easily iron out once they understood each other's point of view.

In another city, the librarians had never had adequate contact with the teachers of evening courses offered by the university. At the start of each semester the library was flooded with student requests for books which it had in only limited supply. One fact-finding conference happened to bring together one of these librarians and one of the university officials responsible for the evening class program. It became clear to both of them that some simple administrative procedures would insure a more adequate supply of books to the students.

In four of these fact-finding conferences, adult educators from states which had no adult education association or council developed plans for follow-up meetings. Result—new state associations, councils, and statewide adult education conferences where none existed before.

These kinds of results had not been predicted by the committee which planned the fact-finding conferences. Nor could the Area Project Committee have predicted the number of instances where misunderstandings were cleared up and new channels of communication established.

After more than 500 people had met in these 12 conferences, the Area Project office had accumulated a considerable body of information about adult education. But more important than that—scores of the people who attended these conferences went home and took steps toward positive action.

analysis and outcomes

The committee began to look back over the exploratory conferences and ask, "Why did this happen? What caused these results?" "What is there about the process of bringing people together for fact-finding that causes them to go beyond that process to problem-solving?" These findings were similar to those of other fact-finding efforts. For example, Richard Poston, in his *Small Town Renaissance*—a report of a series of field studies in Montana communities—found that when a group of representative people from a community came together for a systematic study of their community, they almost always developed enough interest, cohesion, and commitment to take positive action about the problems identified in the meetings. Experience seems to indicate that this same sequence occurs whether it is a one-day meeting, like the Area Project Conferences, or a 10-night study series, as in Poston's Montana Study.

A further test of this thesis came during the period between October,

1953, and June, 1954, when people and groups associated with the Area Project conducted fact-finding conferences on state and community levels. State conferences were held in Georgia, Florida, North Carolina, Alabama, Louisiana, and North Dakota. Fact-finding conferences were also held in more than 30 communities in the Mountain-Plains states of Colorado, New Mexico, Utah, and Wyoming.

Again and again the pattern was repeated—fact-finding lead to better relationships, more cooperation, increased joint planning, and more effective community action.*

In one New Mexico community, the group originally brought together in a fact-finding conference began systematically to attack and solve a number of community problems. Their first achievement was a renovated library; the second a new community swimming pool. From there they moved toward other community improvements.

In a Colorado town, all racial and economic groups were brought together after a fact-finding conference. A new community-backed adult education program got underway as a result.

Detailed records of these and other local, state, and regional conferences indicate that fact-finding conferences can and do produce many results besides new information. From these records we have drawn some general guides for the fact-finding or exploratory conference which should be helpful in other situations.

---

*A detailed description and evaluation of the community fact-finding conferences held in the Mountain-Plains states is presented in *The Mountain Plains Project in Adult Education* by Clarence D. Jayne and Jack R. Gibb (1955). This report is available from the Adult Education Association of the U.S.A.

III

TEN FEATURES OF THE FACT - FINDING CONFERENCE

In order to know when to use the fact-finding conference to obtain subsequent positive action, it is necessary to know why conferences called to collect information produce these other effects. We have isolated 10 features of the fact-finding conference that seem instrumental in producing the results obtained.

1. The fact-finding conference can bring together people who would not come together otherwise.

No commitment is required, making it possible for individuals whose organizations or departments or agencies are seen as rivals and competitors to participate without compromising their organizational loyalties. Representatives of management and labor, of agricultural extension and public schools, of professional and lay groups, of different staff levels, and many other divergent groups can participate in fact-finding conferences even if they have different approaches and despite the fact that some of them may view the programs of others with dismay and suspicion.

2. The fact-finding conference provides a comfortable setting in which to express ideas and attitudes.

The participant knows he will not be required to "take a stand" on anything or officially endorse any plan of action. He is not viewed as an official representative of his organization so no one expects him to defend the group to which he belongs. He simply is to report and describe his group's program and problems, not to impress or defend. The fact-

finding purpose of the meeting encourages information-giving and objectivity rather than comparison and evaluation.

3. The fact-finding conference helps to clear up misunderstandings.

Misunderstanding results partly from lack of information and/or lack of communication. The fact-finding conference is uniquely equipped to resolve misunderstandings. Problems of relationships between agencies or people do not become *issues* for resolution at the meeting, but are presented as informational items. They are not discussed in the context of "who is to blame", but rather as obstacles toward achieving common goals.

4. The fact-finding conference establishes many new informal channels of communication among participants.

Individuals attending the conference get to know each other and to see who is associated with various organizations. Since no participant is acting as an official representative of his group, a situation exists in which *personal* relationships can be established more easily. The result is that when an executive of one organization or the head of one department or branch needs to make contact with some other group later on, he has a personal contact. Thus, even though no official relationships have been established between the two organizations or departments, an informal liaison has been created which is likely to make each more useful to the other.

5. The fact-finding conference produces more information and insights than are possible through other survey methods.

Surveys and other media do not provide the stimulation and interaction necessary to help people identify basic issues and develop new insights. Often the most important information about organizations in a community exists only in the minds and feelings of people, and this kind of information is difficult to put on a questionnaire form. Sometimes such information is also difficult to report to an interviewer. However, in a setting in which one idea "triggers off" another, a bit of information which might have remained hidden comes out. It is doubtful whether anyone could devise an interview schedule that could elicit the kind of information about interpersonal and inter-organizational relationships that emerges in the fact-finding conference.

6. The fact-finding conference stimulates follow-up action growing out of real needs.

Because such a conference has no stated *action* goal, the group is free to spend more time in diagnosing problems. Any plan that develops must clearly grow out of needs and problems felt by the entire group. There is less chance that the group will push for action for action's sake. By contrast, conferences set up specifically for problem-solving or planning purposes sometimes press participants to make action decisions before they have adequately diagnosed problems or obtained facts.

7. The fact-finding conference paves the way for cooperative action.

The experience of looking together at community needs and analyzing them helps develop a sense of unity. Staff members who have a day-to-day responsibility for preparing programs learn to know other individuals in the community who share similar objectives and face similar problems. When problems of common concern are brought out by a fact-finding conference, it is only a short step to ask, "What can we do *together* to deal with these problems?"

8. The fact-finding conference enables participants to understand more fully the objectives, boundaries, and problems of other organizations.

In this setting, information about organizations is usually looked upon as *objective*. Every organization has certain limitations and points of emphasis in its program, and it is helpful to other groups to know what these limitations and emphases are so that there can be a better understanding among groups in a community. In a fact-finding conference this kind of information is regarded as factual; evaluation is out of bounds. The *ad hoc* conference group obviously has no power to change the existing boundaries, and so the discussion is limited to analysis rather than recommendation.

9. The fact-finding conference is rewarding to the individual participant.

The setting of the fact-finding conference gives each participant a good chance to make new acquaintances, to develop better feelings of understanding and better relationships with other key people in the community. There is also greater freedom and encouragement to participate than many organizational leaders usually encounter. Since no one is an official representative, he can express himself quite freely. For example, the labor leader need not represent labor, but in this setting can react to community problems as a citizen who has a certain background of

experience. The same is true of the teacher, the Chamber of Commerce executive, the YMCA secretary, the regional director, foreman, etc. In general, participants at fact-finding conferences find the experience a pleasant and rewarding one.

10. The fact-finding conference produces an unusually good setting for creative thinking.

Many of the pressures which tend to inhibit creative thinking are absent—defensiveness, threat, criticism, and pressure to reach a decision in a limited time. The effort to diagnose problems at as deep a level as possible tends to suggest new patterns of relationship and new kinds of activities. Experience indicates that the group will tend to go further than the superficial identification of problems and will concern themselves with basic issues. When this occurs, the way is open for new and creative approaches to long-standing issues.

While many of these features may characterize other types of conferences, the combination of features seems to occur more readily in the fact-finding meeting. One reason for this is the way the fact-finding conference is planned.

IV

PLANNING AND CONDUCTING THE FACT-FINDING CONFERENCE

We have seen some of the results the fact-finding conference can produce and some of the reasons why. Let's look now at how positive results can be facilitated in planning and conducting the conference.

If you decide to hold a fact-finding conference, where do you begin? Let's assume that you have two purposes in mind: (1) to get information from a group and (2) to provide an opportunity for this group to explore common problems. Let us also assume that you have decided to provide a consultant or a consultant team* to help the convener plan and conduct the conference.

Given these conditions, it is useful to look at some of the specific tasks to be done at various stages. For convenience, we can think of the total conference activity as including five phases:

1. Initial planning.
2. Program development.
3. Final preparation of pre-conference plans and arrangements.
4. Conducting the conference.
5. Reporting, appraisal, and follow-up.

---

*The consultant role in this kind of conference is explained more fully in Chapter V. In general, the functions include helping to get the desired information and assisting the conference group to analyze it.

initial planning

1. *Decide who should convene the conference*–Set up criteria for selection (e.g., status, skills, experience required) before listing names.

2. *Decide who should be invited to the conference*–Develop criteria for categories of participants (e.g., different viewpoints, organizations, institutions to be represented and kinds of resources needed).

3. *Decide on the strategy and method of inviting participants*–Try to find out who in each group (department or organization) will actually decide whether or not someone from that organization will attend. What are likely to be the resistances to having someone from that organization attend such a conference? What do these key people need to know about the conference? In the case of organizations, sometimes the national office determines whether its local constituents may participate; in other instances, the national office endorses a conference but leaves the decision to local personnel; in still other cases, the local individual or group decides. Strategy should be planned accordingly. Even though participants do not officially represent their organization, the convening group should be aware of the organization's practices and policies.

4. *Clarify the purposes of the conference*–Even though many fact-finding conferences result in plans for action, this should *not* be their purpose. The planners should be very clear in their own minds that the sole purpose of the conference is to bring together people to share important information and to explore its implications.

5. *Begin to set common expectations for the meeting*–The letter of invitation should state as clearly as possible the purpose and hoped-for-outcomes of the meeting. Stress the fact that this is a "one-shot" affair without any further commitment implied.

It is *essential* that those invited know:

a. Who is sponsoring this conference.
b. The purpose of this conference (fact-finding) and what its outcomes might be.
c. The kinds of people who are being invited and how they were selected.
d. The time schedule and location of the meeting.

It is desirable that those invited also know:

a. What the individual participant's role is and what he can hope to gain from participating in the conference.
b. Enough about the conference to check opinions with others in his organization before the conference is held.

c. How this conference might help organizations and the cause of adult education in the community.

program development

1. *Arrange a planning meeting between the chairman and the consultants*—Remember that even experienced discussion leaders are usually novices in running a fact-finding conference. The local chairman must clearly understand the objectives and the unique elements of the conference in order to insure its success. A meeting between the chairman and the consultants prior to the conference should accomplish the following:

a. Clarify purposes and hoped-for-outcomes of the meeting.
b. Clarify what the chairman and consultants will do during the meeting.
c. Develop a tentative conference agenda.
d. Anticipate possible problems and develop plans for dealing with them.
e. Plan physical arrangements for the meeting.

2. *Develop a tentative agenda*—Make sure that there is adequate time for orientation of the participants and for all participants to air their problems.

final preparation

1. *Give careful attention to physical arrangements for the conferences*—Consultants should have a check list of items relating to physical facilities (arrangement of room, provision for blackboards, notebooks, lunch facilities, etc.). Experience has shown that attention to such small details makes a great difference in the quality of the conference.

2. *Plan for adequate reporting of the conference*—Determine in advance the categories of information that will be desired. (See Sample Report Form Questions, page 21.) This helps the recorder to take systematic notes during a rambling discussion. It helps to get two reports —one from the consultants and another from a recorder chosen from the group. Usually the consultants identify and diagnose problems in a manner somewhat different from what appears in the recorder's notes.

3. *Decide on what procedures will be used in the conference*—Since the purpose of the conference is to "pick the brains" of the participants, it is important to use procedures that encourage quick and easy participation by all.

4. *Define clearly the roles of the consultant team*—Wherever possible,

Sample Agenda

(A COMMUNITY FACT-FINDING CONFERENCE ON ADULT EDUCATION)

1. Orientation.
   a. Purpose of this meeting
   b. Who is in this group and how the group was selected
   c. Events leading up to this conference and relationship to the convening organization
   d. Who the consultants are and what their roles will be in the conference
   e. Who the recorder is and what use will be made of the notes
   f. Role of the participants (point of view they should take during this meeting)
   g. Plan for the day
   h. Announcements on housekeeping items like lunch plans, etc.

2. Discussion of Adult Education in This Community.
   a. What are the principal needs for adult education?
   b. Who is doing what about these needs now?
   c. Where are the gaps in existing services?
   d. What obstacles prevent us from filling these gaps?
   e. Are there areas in which different groups are duplicating efforts?

3. Identification of Areas in Which Cooperative Planning or Action Could Take Place.

4. Identification of Resources to Improve Adult Education in this Community.
   a. Unused resources in the community
   b. Outside resources available to the community

5. Planning Next Steps for the Group (if it decides to continue).

use a *team* of two consultants rather than a single consultant. Their separate roles might be described as follows:

a. *The information-giving role.* This consultant gives background information about the conference and interprets the objectives of the initiating group. He also does most of the note-taking during the discussion, since he is to report this information to the initiating group. In performing this role he can occasionally help the group to clarify its thinking by checking his notes with them.

b. *The probing or question-asking role.* This consultant tries to help the group get beneath a superficial description of needs, activities, and problems. He raises questions like, "What unique purposes are served by this organization?" or, "What obstacles have prevented you from going ahead with these plans?" As an outsider, he can sometimes put his finger on some inter-group problems which members of the group might be reluctant to state publicly.

conducting the conference

1. *Anticipate these problems:*

a. Some participants will come to the meeting with unclear or erroneous expectations.

b. Some participants may find it hard to believe that someone has gone to the trouble of convening a group for the simple purpose of gathering information and providing a setting in which local people can discuss common concerns. They may be suspicious of the convener, the consultants, and the initiating group.

c. Even if such a conference achieves its fact-finding objectives, some participants will view it as unsuccessful if it does not result in some action or the creation of a new organization.

d. It is difficult to communicate to the participants in advance the nature of the conference, since it differs from most meetings they attend.

e. Because it is often a "one-shot" affair, the convener of each conference cannot easily take advantage of the experience from previous conferences of this nature. Here is where an experienced consultant can be particularly helpful.

f. If the consultant and the convener do not have sufficient time to plan together, there is a likelihood that they will be pursuing different goals in the conference with the result that the participants will be greatly confused.

g. Since conveners are usually experienced in running meetings, they frequently under-estimate the importance of pre-conference planning with the consultant.

Sample Report Form Questions

(FOR A COMMUNITY CONFERENCE ON ADULT EDUCATION)

1. Prior to this conference have people concerned with adult education services in this community ever gotten together to discuss programs, community needs, etc.?
2. Is there any agency in this community which provides for systematic discussion of over-all community educational needs? (A community adult education council, etc.)
3. What organizations or agencies seem to be carrying on the most active adult education programs in this community?
4. What did this group identify as the needs of people in this community that could be helped by adult education services?
5. What did the participants in this conference see as the principal obstacles they face in providing such services?
6. Did this group identify possible adult education resources which are not now being used to the fullest capacity?
7. Did this conference group discover any new ways in which they could cooperate with one another? What plans did they make?
8. What was the general "climate" of this conference? (Comfortable, work-centered, formal?)
9. Jot down any ideas about adult education programs or procedures that might be passed on to adult educators in other communities.
10. What specific actions or next steps were decided on at this meeting?
11. What actions and activities do you think will come about as a result of this conference?
12. What would have made this conference more effective?
13. What do you consider your most important learning from this conference?
14. Your recommendations for next steps (e.g., further contacts by consultant team or others, materials to be sent, etc.).
15. Other remarks or observations (e.g., human interest items, comments on relations among different agencies, etc.).

h. At the outset, some participants will view this conference as an opportunity to publicize their organization's program and to enlist the group in furthering some of their pet ideas.

i. In their eagerness to plunge into some kind of cooperative action, the group may cut short the time needed for adequately diagnosing problems. If this happens, a central value of the fact-finding conference is lost.

j. If a good feeling emerges, the group may enthusiastically create an organization without clearly thinking through the functions which such an organization would perform. The result may be a "paper organization" developed in a burst of enthusiasm, which subsequently flounders because it has no clear purpose.

2. *Some procedural suggestions:*

a. In order to make sure that the total group is moving toward the same objective, take enough time to clarify the purpose of this conference. Following an initial statement of purpose by the convener, the group should have a chance to examine their understanding of this purpose.

b. If possible, provide for name cards. If the procedure of self-introduction is used, the chairman should make very clear what kind of information about each participant is needed for achieving the purpose of this particular conference.

c. Make sure that the plan for the day is clear before general discussion begins. Obviously this should not be a minute-by-minute plan, but should outline the big jobs to be done during the conference. Putting this on the blackboard and getting group agreement to it will tend to keep the group on the track.

d. Establish a free atmosphere early. One way of doing this is for the chairman to say something like this: "For the next 20 minutes, let us get on the blackboard a list of the problems we are concerned with in our community. Let's not evaluate their importance or worry about whether one problem duplicates another at this time. Let's get them all out and then we can go back and set priorities, combine duplications, etc." If the group is large, this "brain-storming" might begin in sub-groups with each group reporting one or two major problems it has identified.

e. Suggest to the recorder that he help the group by clarifying and summarizing discussion when he sees the need.

f. Arrange for the chairman and the consultants to meet during breaks in the meeting to assess the group's progress toward its goals and to plan the remainder of the meeting.

g. Make clear that those from outside the local group are not attending the conference as experts, but as listeners, fact-finders, and interpreters. The group must feel sure that the outsiders have nothing to sell—

that they are there simply as helpers. (This is, of course, much easier said than done.)

h. When people who are accustomed to quick decision-making become frustrated, the chairman or consultant should re-emphasize the fact that this is not an action group. Participants must see fact-finding and diagnosis of problems as worth-while objectives in themselves for this conference.

reporting, appraisal, and follow-up

1. *Prepare a selective, rather than comprehensive report*—Since a fact-finding conference is specifically called to gather *certain kinds* of data, the report ought to make these data stand out. Chronological minutes are not likely to accomplish this. The recorder (and certainly the consultants) ought to be clear on certain important issues before the meeting begins. Some sample questions pointing up such issues are shown on page 21.

2. *Write the report promptly*—Where a consultant team is used, it pays to have the team meet with the chairman and the local recorder *immediately* after the conference to summarize the findings and evaluate the conference. A team report prepared in this way tends to capture the essential spirit of the conference while it is fresh in mind. It is also an easier time to write the report.

3. *Anticipate follow-up inquiries and decide on a policy for dealing with them*—Since fact-finding conferences so often lead to action, the conference leadership team is frequently asked to undertake assignments following the meeting. They should be prepared to deal with requests to "call another meeting", "get more information", "find out what other groups like ours do", etc. In general it is desirable that the group itself assume the responsibility for any follow-up action. The consultants should be particularly wary of letting the group become dependent upon them.

The tasks and suggestions listed above are obviously not intended to be exhaustive. Our hope is that they will call attention to some aspects of conference planning which are sometimes neglected.

V

A WORD ABOUT THE CONFERENCE CONSULTANT

One of the unique characteristics of the fact-finding conference is its use of an outside consultant or consultant team in a key role. While other conferences often use outsiders as resources, the consultant in the fact-finding conference has a somewhat different role.

His job description might read like this:

1. To help the chairman plan the conference
2. To help the chairman interpret the background and purpose of the conference
3. To help the conference participants to identify and diagnose problems
4. To make procedural suggestions
5. To report relevant data from similar conferences

Since the readers of this manual are likely to serve in consultant roles in various conferences, we are presenting here some suggestions that Area Project consultants have found helpful. Most of these probably apply to the consultant role in any conference.

1. As the consultant, it is important to think of yourself as the *servant* of the group, rather than the *leader* or *expert*. Your job is *not to tell* the local group what they should do, but *to help them achieve* the objectives of the conference.

2. You are in an excellent position to ask questions of clarification and questions testing the purposes of the group. Highly involved people who are in the midst of developing plans sometimes forget to ask questions of this sort. As a consultant, you are better able to remain uninvolved in the plans themselves, maintaining a more objective view, and calling the group's attention to implications of its plans.

3. To be most effective, you should be seen by the group as a subordinate member of the leadership team. The local leader should be clearly in charge of the meeting and the group should feel that their chairman will help them control you. This both reduces the natural hostility toward the outside expert and also helps to insure the feeling that "this is *our* meeting," rather than that "this is a meeting in which an outsider will tell us what we should do".

4. It is essential that you meet with the local chairman *in advance of the conference* to make sure that you both agree on the purpose and hoped-for-outcomes of the meeting. It is also important that you have a clear understanding about who is going to do what during the meeting and how he will explain each of your roles to the group.

5. See to it that your role is clearly described at the outset of the meeting. This description should include such things as: (a) who you are; (b) how you came to be here; (c) what unique resources you have that will help the group; (d) how the group can use you during the meeting. For example, in his opening remarks, the local chairman might say something like this:

> "We are fortunate to have Mr. Jack Adams meeting with us today. Mr. Adams is training director for the National Cultivator Company in Center City and is very much interested in how adult education groups can work together in communities. For the past two years he has been president of the Center City Community Council and he has also attended a number of state and national meetings where community planning was discussed. Because of his background, Mr. Adams will be in a position from time to time to bring to our attention some of the problems community planners face, and he will be able also to tell us how some other community groups have dealt with problems similar to the ones we face here in Asheville. Mr. Adams made very clear to me during a little session before this meeting began that he does not want to give us any speech, but I told him he should feel free to chip in any ideas he has as our discussion proceeds."

6. Be prepared to resist efforts by the group to become dependent upon you. Remember that the membership of the group will be responsible for the plans developed long after you have left. The plans, therefore, should be clearly *theirs*, not the consultants'. The confidence of the group should be developed, *not* in the expert, but in the local leadership and the local group. They should see you as helpful, but expendable. One way to accomplish this is to steer clear of making any decisions for the group. Your primary job is to help a group reach its own decisions by providing additional information and perhaps alternative plans. For example, if a group asks you a direct question like, "Mr. Adams, do you think we should try to get a community council started before we begin this new

building project, or later?" instead of giving a definite answer it might be better to say something like this: "Well, you people certainly know better than I the particular problems in Asheville, and you are, therefore, much better able to decide which of these two approaches makes more sense. I think in reaching this decision of whether to form the council or undertake the project first, you might want to consider questions like these: (Then point up issues.) For what it is worth, I can tell you that when this problem came up in Amherst, the group decided to undertake the Project first. They found that once they got people actually working together they began to see a reason for forming a council. But, of course, I have no idea whether this same thing would happen here in Asheville." This kind of response to a direct question keeps the decision clearly in the hands of the local people and at the same time brings to their attention facts and points of view that will help them to make a sounder decision.

7. As an outsider, you can sometimes play a very useful role as an *observer* of the group. Because you are not identified with any particular interests that may be present, you may be able to bring the group attention to undercurrents that are influencing the discussion. For example, you may be able to say something like this:

> "I notice that you have been discussing how to start the project for the past half hour without making much headway. I wonder if we are just a little worried about which organization is to take the lead in this matter, and how we are going to interpret this to our own groups when we leave this meeting. Is this a concern we have, or am I mistaken?"

This kind of comment can help a group to come to grips more directly with the problem it is handling "under the table".

8. Do whatever is necessary to reinforce the idea that you are "just working here", and that you regard the group and the leader as being in charge. You might point up the relationship that you have worked out with the local chairman through comments like this:

> "Before I answer this question, I would like to check with Mr. Johnson (the chairman) and the rest of the group on whether this is the way you want to use me. Would I be more helpful if I did thus and so or if I did so and thus? As I recall during our preliminary session, Mr. Johnson thought that I would be of most use to you if I did thus and so—but I'll do whatever you say."

You will notice that all of these suggestions imply a good working relationship between you and the chairman. This cannot be overemphasized. If the chairman and consultant are "on the same team", they will bring to the conference the kind of security that will put the group at ease. This is leadership at its best.

VI

TO SUM UP

1. We have looked systematically at the fact-finding conference from the point of view of:
   a. its peculiar or unique characteristics
   b. what it can accomplish
   c. procedures for planning and conducting it
   d. the special consultant role.

2. Our illustrations have been principally from community organization for adult education because of our three-year study in this field.

3. Since similar problems appear in other situations, the same principles can be applied in other settings such as:
   a. interdepartmental situations
   b. different levels of an organization
   c. between organizations in a professional field
   d. for committee work in professional and technical associations.

4. This is not a new form of conference, but it is one on which not as much systematic study has been done as on other forms, and it is one for which procedures are just beginning to be systematized. This document is part of that effort.

5. This has been an attempt, through the use of experience accumulated over a three-year period, and through a more or less systematic study of the process, to give some guides on the "why" and "how to" of the fact-finding conference, which the reader can apply to his own situation. ◆◆◆

RELATED READINGS

NEW WAYS TO BETTER MEETINGS. *By B. and F. Strauss, New York: Viking, 1951.* Chapter XIII deals with the large meeting. Chapter XIV, with the work conference.

HOW TO WORK WITH GROUPS. *By Audrey and Harleigh Trecker, New York: Whiteside Press, 1952.* Chapter 7 is on "How to Work with a Large Meeting".

COMMITTEES AND CONFERENCES. *By William E. Utterback, New York: Rinehart, 1950.* A handbook of basic principles for leading successful conferences and committee meetings.

GROUP THINKING AND CONFERENCE LEADERSHIP. *By William E. Utterback, New York: Rinehart, 1950.* See especially Chapter 14 on "The Discussion Conference".

IMPROVING LARGE CONFERENCES. *Leadership Pamphlet* #11. Adult Education Association of the U. S. A., 743 N. Wabash Ave., Chicago 11, Ill. How to organize large conferences for work; roles of discussion leaders, recorders, observers, resource persons.

CONFERENCE LEADERSHIP. Esso Training Center, 1104 Elizabeth Ave., Elizabeth, N.J. A text and reference to assist in the development of conference leaders for training programs, with a useful appendix on evaluation, and many visual aids.

CONFERENCE SENSE. Superintendent of Documents, Government Printing Office, Washington 25, D.C. A clever presentation of the personalities who often sit around a conference table and how to work with them.

HOW TO HAVE A SUCCESSFUL CONFERENCE. Bureau of Education Research, Ohio State University, Columbus 10, Ohio. NPL. An illustrated "how-to" pamphlet for conference chairmen.

TWO LESSONS IN GROUP DYNAMICS. 2 articles on committees and conferences. *Adult Education Association of the U.S.A., 1201 Sixteenth St., N.W., Washington 6, D.C.*

INTRODUCING THE AEA

The AEA (Adult Education Association of the United States of America) is a non-profit organization founded in May, 1951, as an instrument for developing a united adult education movement. The general purposes of AEA, as stated in its Constitution, are:

—"To further the concept of adult education as a process continuing throughout life.

—"To promote and develop adult education in the United States by affording opportunities to professional and non-professional adult educators to increase their competence and by encouraging and assisting organizations and agencies . . . to develop adult education activities and to work together in the interests of adult education.

—"To receive and disseminate information about adult education.

—"To promote the balanced development of educational services for adult persons in the United States.

—"To cooperate with adult education agencies internationally."

United in the AEA to further these purposes through a program including field services, conferences, publications, and public relations, are over 12,000 men and women who work with adults in formal and informal educational and training programs. These leaders represent every sector of American society—education, labor, agriculture, industry, religion, social welfare, government service, and a host of voluntary associations.

Adult Education Association of the U.S.A.
743 N. Wabash Avenue
Chicago 11, Illinois